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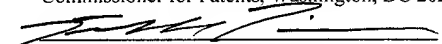
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jc907 U.S. PTO
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Date of Deposit: August 16, 2000

jc886 U.S. PTO
09/639740
08/16/00

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Signature of Person Mailing Paper

PATENT
Attorney Docket No.: 1113-201

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

| | | | |
|-----------------------|----------------------------|-----------------|---------|
| In re application of: | Dver | | |
| SERIAL NO.: | Unknown | Group Art Unit: | Unknown |
| FILING DATE: | August 16, 2000 | Examiner: | Unknown |
| FOR: | LEAD SUSPECT MANAGEMENT | | |

TRANSMITTAL LETTER

Assistant Commissioner for Patents
Washington, DC 20231

Sir:

Transmitted herewith for filing is a utility patent application under 35 U.S.C.

§111(a) of Dver for LEAD SUSPECT MANAGEMENT. Enclosed are the following:

1. Utility patent application, including Specification and Abstract (46 sheets),
2. Drawings (17 sheets),
3. Inventor's Declaration and Power of Attorney (2 sheets),

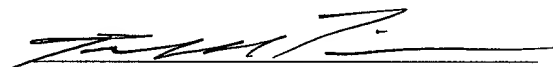
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1. Verified Statement by Small Business Concern Claiming Small Entity Status (2 sheets),
5. A Credit Card Payment Form (1 sheet), and
6. A self addressed stamped postcard.

A credit card payment form is attached authorizing payment of the filing fee in the amount of \$804.00. Please stamp the postcard indicating the serial number assigned to this patent application.

Respectfully submitted,

By:



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August 16, 2000

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STATEMENT CLAIMING SMALL ENTITY STATUS
(37 CFR 1.9(f) & 1.27(c))--SMALL BUSINESS CONCERN

Docket Number (Optional)
1113-201

Applicant, Patentee, or Identifier: Dyer

Application or Patent No. _____

Filer/Issued: Filed herewith

Title: Lead Suspect Management

I hereby state that I am

- ☐ the owner of the small business concern identified below
☒ an official of the small business concern empowered to act on behalf of the concern identified below

NAME OF SMALL BUSINESS CONCERN Lead Factory Inc.

ADDRESS OF SMALL BUSINESS CONCERN 23 Nancy Drive, Ashland, MA 01721

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- ☐ the specification filed herewith with title as listed above.
☐ the application identified above
☐ the patent identified above

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☐ no such person, concern, or organization exists.
☒ each such person, concern, or organization is listed below

Sedona Corporation

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NAME OF PERSON SIGNING Alyssa Dyer

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SIGNATURE Alyssa Dyer DATE 8-15-00

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Docket Number (Optional)
 1113-201

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Application or Patent No.: _____

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Title: Lead Suspect Management

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NAME OF SMALL BUSINESS CONCERN Sedona Corporation

ADDRESS OF SMALL BUSINESS CONCERN 649 N. Lewis Road, Suite 220,
Limerick, PA 19468

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☒ each such person, concern, or organization is listed below.

Lead Factory Inc.

Separate statements are required from each named person, concern or organization having rights to the invention stating their status as small entities. (37 CFR 1.27)

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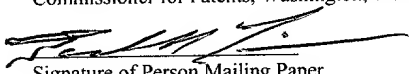
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PATENT
Attorney Docket No.: 1113-201

LEAD SUSPECT MANAGEMENT

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BACKGROUND OF THE INVENTION

1. Field of the Invention

The invention relates to a method and apparatus for effectively tracking prospective customers and contacts. More specifically, the invention relates to a system for a computer implemented algorithm which enables marketing personnel to track prospective customers and contacts through the use of a centralized database and to calendar specific periods in which contact should be initiated with prospective customers or contacts in addition to determining at which juncture a customer, prospective customer or contact should be forwarded to a sales associate, removed from the database, placed in a hold status or have an action taken with regard

to that customer, prospective customer or contact.

2. Description of Related Technology

5 In order to support effective targeted marketing, a provider of products and/or services must know its customer and target market. Knowing one's customers and target market is also important for improved sales and for getting new customers and keeping existing customers. Since knowing one's customers and target market becomes more difficult when the number of customers and potential customers increases and the frequency of each customer's and potential
10 customer's contact with a particular employee decreases, the size of a customer base can present an obstacle to some marketing efforts. It is also important to maintain an active data base with a workflow management for tracking and managing all potential sales and marketing Leads. In the fast paced marketplace of today, it is difficult to track and ascertain the needs of the customers and potential customers and to provide targeted marketing campaigns. Accordingly, there is a
15 need to provide a product which assists in providing effective and targeted marketing and takes a potential or existing customer or marketing Lead all the way through from first contact to a sale of the products and/or services.

A. Databases

20 In an effort to deal with a large customer database, businesses traditionally maintain customer records. In some cases these records are in the form of simple paper records, but recently electronic records have become common in the industry. Originally, separate data storage was used for each electronic record keeping application. Thus, each department in a
25 corporation would have a software program that created and maintained records needed for its specific purpose, *i.e.* sales and marketing. The problem with this approach is that information must be extensively duplicated. For example, a customer's name and address might appear in separate files in several different departments. Accordingly, maintaining separate electronic

records for different departments is not only expensive and time consuming, but it does not provide a central system for managing marketing and sales Leads.

There are other problems with application specific data storage. Since a customer's information is entered in more than one file, any change in status must be entered into each file, often by different people. Over time the accuracy and uniformity of the data deteriorates. For example, a person in the marketing department for one product may update their database, but a person marketing a second product may not update their database. In addition to the problems associated with duplication errors, the use of application specific data storage requires more data entry and more storage space. Accordingly, application specific data storage can become very expensive to acquire and maintain.

Databases for maintaining records have been around for nearly a quarter of a century and have come a long way toward eliminating problems associated with specific data storage. In a modern database, data is stored in a central location so that duplication of data does not occur. Database management programs and algorithms are used to manage databases. Typically, a database management system (DBMS) is used to manage the creation, storage, access, updating, deletion, and all facets of use of a database. A typical DBMS creates databases and their structures; provides the means for the control and administration of the data in the database; provides the means for users and application programs to access, enter, modify, and manipulate the data in a database; provides a report generator; provides "ad hoc" query facilities; provides reports to management on who accessed the database and what activity was performed; provides reports to operators on hardware utilization, status of current users, and other monitoring data; and provides automatic backup and recovery routines for the data in the database.

B. Database Models

There are four basic database models: (1) hierarchical, (2) network, (3) relational, and (4) object oriented. The hierarchical and network models use files for storing data. Data relationships in the hierarchical databases follow hierarchical, or tree structure, which reflect

either a one-to-one or a one-to-many relationship among the record types. Data relationships in network databases follow a many-to-many relationship among the records. The data relationships must be defined at the time that a hierarchical or network database is created. Relational databases use tables for storing data. The data relationships can be dynamically
5 determined by the users and do not have to be defined when the database is created. A relational database uses a database query language for users to access and manipulate data in the database. Object oriented databases store data together with procedures in objects.

For purposes of this discussion, we will focus on relational databases. A relational database is composed of many tables in which data is stored. Tables in a relational database
10 must have unique rows, and each cell or field must contain only one item of information, such as a name, address or an identification number or marker. A relational database system allows data to be readily created, maintained, manipulated, and retrieved. Accordingly, a relational database system is desirable for an application adapted to track sales and marketing Leads for specific products and for effectively and efficiently conducting a marketing campaign.

15 In most sophisticated relational databases data is retrieved by querying the database. Query languages allow users to locate specific records based on the data that the specific record contains. In this manner, the specific data relationships do not have to be predefined. Users may query a relational database and establish data relationships spontaneously by joining common fields. A database query language acts as an interface between users and a relational DBMS.
20 Accordingly, the database query language used in a sophisticated relational database permits the spontaneous creation of relationships between database fields.

There are essentially two basic query styles used in a relational database query by example and structured query language (SQL). In query by example, the DBMS displays field information and users enter inquiry conditions in the desired fields. Currently SQL is the
25 standard database query language used with relational databases. SQL is a database language component of a DBMS, not a separate stand-alone software program. SQL allows users to create and operate sets of related information that are stored in tables and allows users to describe data the user wishes to see. SQL also allows the users to define the data in a database and manipulate

the data. Accordingly, the use of SQL in a DBMS provides the necessary capabilities for a relational database to utilize the data stored in the database's tables.

The central function and major utility of SQL is its flexibility in how a database is queried. Since data in relational databases is stored in tables that have specific properties, the flexibility required to manipulate and create dynamic data field relationships is provided and made possible by SQL. These specific properties include: (1) one or more named columns, (2) data in each column being of the same type, (3) zero or more rows within the table (zero rows occur when the table is defined but no data is entered yet), (4) every row is unique, (5) a single data value is contained in the intersection of any column and row, and (6) the order of the columns and rows does not matter.

C. Retrieving Data from a Database

There are two basic schemes for retrieving data from a database: set orientation and record orientation. Each method has advantages and disadvantages.

A set oriented database allows the user to focus on the characteristics of the data rather than the physical structure of the data. The user works with data in groups, sets, or tables, rather than as individual tables. Examples of set oriented databases are Microsoft SQL Server, Oracle, Sybase, Informix, Access, and SQL Base. Record oriented databases access data based on the physical structure of data indexing. A record point permits the user to maneuver through a table one record at a time. It is easy to access successive rows or records in a table. However, the developer of the DBMS must write the programing code such that it will loop through every record requested in order to function properly. The requirement that one loop through every record of the table is a substantial disadvantage for the record oriented scheme. Accordingly, the use of a set orientation scheme for retrieving data has a substantial advantage over that of the record oriented scheme.

D. Database Security

In an DBMS, security is maintained by granting authority to an administrator or other users of the system. Authority may be granted to access the entire database, certain tables within the database, or certain commands. At least one individual must act as a database administrator who must have access to the entire database so that the database will be properly maintained. However, users are generally granted access to specific tables or parts of tables to perform their required functions. Accordingly, maintaining security provides for a hierarchy of access rights to the database and may allow for a division of responsibilities between users.

SUMMARY OF THE INVENTION

It is therefore an object of the present invention to provide a system for tracking and managing sales and marketing Leads that provides an organized and effective manner of targeting prospective clients and/or customers using a centralized database. More specifically, the present invention is directed to a system that allows a sales and marketing team to take advantage of a centralized database which focuses on management of these Leads.

It is a further object of the invention to incorporate a workflow management system into the database. The workflow management system identifies and associates the Lead with specific products and/or services. Each Lead may be separately tracked and managed for different products and/or services. Individual Leads are moved to different stations at predefined intervals, wherein movement to a subsequent station is indicative of a marketing effort having been performed on the Lead in conjunction with a reaction of interest or lack thereof from the Lead.

In an even further object of the invention, Leads may be imported into the database from external sources, either manually or through a data transfer. In the event of a data transfer from an external source, the source of the particular data predefines which station location the Leads will enter the workflow system.

It is an even further object of the invention to produce reports analyzing the management

of the workflow within the system. The reports may be customized to address specific stations and any difficulties a Station Master of a specific station may be confronting. In addition, the database may be programmed to automatically generate specific reports at predefined intervals, and send the reports electronically to selected individuals.

Accordingly, these and other objects are achieved by providing a database in conjunction with a set of workflow rules. The database provides the structure for storing the information for each Lead that is being tracked and managed, and the workflow provide the method through which the Leads are managed. Each Lead is placed in a marketing and sales campaign, wherein specific functions must be achieved at a specific predefined time intervals in order for the Lead to progress through the workflow. Progression of a Lead to different stations in the workflow is based upon the actions of the Station Master at a specific station and the reaction of the Leads to the marketing and sales effort put forth by the Station Master. Accordingly, the workflow system ensures that each prospective marketing and sales Lead is managed at specific time intervals to maximize the Lead's potential as a perspective client and ensure that opportunities to convert potential clients into actual sales are not lost, misplaced, or otherwise forgone.

BRIEF DESCRIPTION OF THE DRAWINGS

The accompanying drawings provide a further understanding of the invention and are incorporated in and constitute a part of this specification. The drawings illustrate preferred embodiments of the invention and, together with the description, serve to explain the principles of the invention.

In the drawings:

FIG. 1 is a block diagram of a workflow system demonstrating the stages a Lead progresses through a marketing and sales campaign according to the preferred embodiment of this invention, and is suggested for printing on the first page of the issued patent;

Fig. 2 is an illustration of a main menu page for an administrator of the account;

Fig. 3 is an illustration of the menu options for an administrator adding or editing users to

the database;

Fig. 4 is an illustration of a summary of each of the stations of the workflow in conjunction with corresponding editing buttons for each station;

Fig. 5 is an illustration of menu options for an administrator editing station selections for a predefined station in the workflow;

Fig. 6 is an illustration of menu options for an administrator editing and adding source information to the database;

Fig. 7 is an illustration of a form for manually entering Leads into the database;

Fig. 8 is an illustration of a mapping wizard for importing information into the database;

Fig. 9 is an illustration of a menu for selecting the source of the import into the database;

Fig. 10 is an illustration of a search menu for selecting search parameters of the database;

Fig. 11 is an illustration of a report generation menu of the database and workflow management of the present invention;

Fig. 12 is an illustration of a main menu page for a user of the database;

Fig. 13 is an illustration of a menu for selecting auto generating reports of the database and workflow management of the present invention;

Fig. 14 is a table illustrating sample Leads in the database collated according to station location;

Fig. 15 is an illustration of a working page for acting on a specific Lead;

Fig. 16 is an illustration of a form for viewing and/or editing specific Leads in the database; and

Fig. 17 is an illustration of a form for viewing and/or editing company information for Leads stored in the database.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT AND BEST MODE OF THE INVENTION

References will now be made in detail to a preferred embodiment of the invention, an

example of which is illustrated in the accompanying drawings. The system includes a central database with a plurality of workstations. These components are connected together through telecommunication links or an equivalent connecting element that allows the workstations to electronically communicate with the central database. In a preferred embodiment, the database is maintained on a server and all users may access the server via a global computer network, such as the Internet. For purposes of explaining the invention in detail, the invention will be described for marketing personnel and prospective customers. However, it should be understood by those skilled in the art that the invention is not limited to a marketing campaign, but the apparatus and method disclosed herein may be used for tracking and targeting marketing and/or sales of an array of products and/or services. Accordingly, the scope of this disclosure shall be limited to targeting customers for marketing purposes for ease of understanding the invention disclosed herein.

Structure

As used in the following description, a "Lead" is a customer or prospective customer specifically targeted for a marketing and sales effort based upon a probable need. The Lead can be self-identified, part of an ongoing effort, or part of a short term campaign. Basic contact information for each Lead is stored in the database, such as business name, contact person, addresses, electronic mail addresses, and telephone numbers. However, the information fields should not be limited to those listed herein. Additional fields are provided for each record generated, such as source of contact, type of contact, date entered, person who entered the contact into the database, or other identifying pertinent information. These additional fields support the use of the data as it is used within the application and serve to increase the utility of the data within the database.

A "Station" as used herein is defined as a predefined workflow based on the type of Lead and required follow-up. Each predefined Station tracks the source of the Lead input, the marketing activities required for follow-up, and the sales activity once the Lead has been turned

over to the sales department in view of the determination that such a transfer of the Lead is proper. Leads move from one Station to another eventually ending up as either a sale or as a rejected contact. Accordingly, the Stations define the status of a Lead in a marketing campaign as well as further efforts which may be deemed necessary to make the Lead a possible sale or reject the Lead as not interested in the product.

A "Station Master" is a person responsible for monitoring the Leads within their assigned station, with the responsibility of ensuring that the person assigned to specific stations actively markets to the Leads in that station during the time allotted. In the event a Lead remains in a station beyond the predefined time limit, the Station Master may be responsible for taking action on each neglected Lead and ensuring that the proper action is taken on any neglected Lead to ensure that the Lead is not lost in the workflow or deviates from the parameters of the specific marketing campaign. For all Leads that remain in a station beyond the proscribed time limit an alert is generated in the form of an electronic mail which notifies the Station Master, or an alternative user, of the tardiness. In the case where alerts are programmed to be forwarded to the Station Master, the Station Master is then provided the opportunity to actively ensure that an appropriate action is taken on the Lead. Accordingly, the Station Master acts as a supervisor for monitoring the activity in the station to which he or she is assigned.

Upon establishing an account, the database assigns the initial user a customer number which will be attached to each Lead entered in the database for that account. In general, the person establishing the account will be the administrator for the account and act as the account representative. Once an account is established and the administrator for the account has been secured, the administrator may establish each of the users in the account and the privileges assigned to each user. Fig. 2 is a sample illustration of the options available to the administrator for selection upon entering the database. The administrator is responsible for setting up and editing company information 22, setting up and editing user profiles 24, including assigning user names, passwords, privileges assigned to each user, editing source information 26 and setting up and defining station definitions 28. Each user of the system is granted different levels of authority within the database, and it is critical that the administrator manage the authority

granted to the users to ensure that the database and workflow rules remain intact. In establishing user accounts, the initial administrator (account representative) may establish a plurality of administrator level accounts. Fig. 3 is a sample page illustrating the menu options for adding and editing users of the database. In general, the menu selection requires the first name 32, last name 33, electronic mail address 34, password 35, user name 36, company name 37, and a selection of user rights 38. The administrator may select to add a user to the account 42, remove a user from the account 46, or edit user account information 44. Each of these options utilize fields 32-38, as defined herein. Accordingly, the administrator has the authority and requirement of establishing all user accounts within the company allocated database in conjunction with granting of user and/or administrator rights to each user of the database.

Since Leads may be entered into the database through telephone and/or electronic mail contact or through additional sources, it is critical for users to have the ability to edit the source profile. In a preferred embodiment of the invention, only an administrator or an assigned user of the database has the authority to edit source information as the source identifies the originating station for all leads emanating from the defined source. A sample page illustrating how a source is added or edited in the database is shown in Fig. 6. When the user or administrator selects to edit the source profile, the user is presented with a pull-down list of sources 78 present in the database or the user may elect to search the database for specific sources. Once the user has selected the source, they may select the source and select the edit option through a pointer tool. This places the user in the form identifying all the essential fields for the source information. The user may click or move the pointer into any of the fields that require changes and then click the save button 84. By editing the source information, the system is designed to automatically update the database records with the new information. In addition, the source of the lead defines the station in which all leads from a specific source enter the workflow. When editing source information or adding an additional source to the database, it is critical to define the originating station at 74 and/or 82 associated with the source so that all current and future leads will enter the workflow at the proper station. Both in the adding and editing sections, the user or administrator is prompted to select the appropriate originating station at 74 and/or 82 for the

source, which must be selected prior to saving the information. Accordingly, editing of the source information provides the ability to globally edit a plurality of records without manually selecting each record requiring editing.

In addition, the administrator has the authority to change station definitions for each of the predefined stations in the workflow. Fig. 4 is a sample illustration of a summary of each of the predefined stations in the workflow. If the administrator requires editing of any of the station definitions, the administrator should select the station and the associated edit button 48 for the selected station. An example of a station editing window is shown in Fig. 5 for editing of station selections for station one. The administrator may edit the Station Master assigned to the station 52, reassign the Station Master for the station 54, edit the duration a Lead may remain in the station 56, edit to whom a first alert should be forwarded 58, edit to whom a second alert should be forwarded if no response from a first alert following a predetermined period 62, and edit the subsequent station where the Lead should be forwarded 64. In a preferred embodiment, an alert is in the form of an electronic mail message. However, an alert may take the form of alternative communications devices. Alerts are generated through a set escalation process. In general, upon establishing the account the administrator decides which users are assigned for receiving alerts messages for first and second generated alerts, and the time interval required for non-action on a Lead prior to generating any alerts. In addition, the administrator may customize station definitions to design the workflow for their specific needs. Following any edits of a station definition, the administrator must save the information with the save button 66 in order for the edit to take effect in the workflow. In a preferred embodiment of the invention, Each station has predefined intervals which should not be altered once established, as any alteration may affect the management of Leads currently in the workflow. Accordingly, although in a preferred embodiment of the invention the station definitions should not be altered once the account is been established and Leads have been entered, it remains within the actual authority of the administrator to edit the station definitions if so desired.

Each person using the system and accessing the database must be identified by name and password, wherein each authorized user will have the customer number assigned to their

identification. The database is designed to store and manage multiple accounts. As such, all users can only access their database through the unique account identification number, thereby prohibiting the sharing of each account's database information among accounts. In an alternative embodiment of the invention, each account may comprise a discrete database where every authorized user's company may access their discrete database. Accordingly, the user identification and password grant users access to Leads assigned to their account in the database, whether it is a discrete database or a part of a shared database.

In a preferred embodiment of the invention, the database is accessible via a global compute network, such as the internet, and is hosted by either an Internet Service Provider ("ISP") or an Application Service Provider ("ASP"). Alternatively, the product may be hosted on a company specific server with browser front-end access via an Internet Server or a computer connected to a local area network ("Intranet Server"). The ISP, ASP, or Intranet Server is responsible for establishing and managing multiple accounts and ensuring that the database for each account remains intact and is not shared among multiple accounts. In general, the ISP, ASP, or Intranet Server establishes a new company database for each account and a superuser password for the company administrator for the account, so that the administrator may establish user accounts within the database. The ISP, ASP, or Intranet Server may expand the size of the database to hold a greater number of Leads, retrieve passwords for the company administrator and any assigned users, delete and/or edit and necessary data profile information within the database, such as company profile, source information, and station information. Since the ISP, ASP, or Intranet Server manages all established account, the ISP, ASP, or Intranet Server is responsible for backing up all of the account databases, or individual company databases. Finally, the ISP, ASP, or Intranet Server may grant the authority to account administrators to roll back data input defined by a specific user and timespan. Accordingly, the ISP, ASP, or Intranet Server functions as a host of the company databases to edit any default settings in the database that require change, as well as a source for storing and backing up all database information.

Once a company account has been establish and users have been preassigned to specific stations, data is entered into the database and the workflow rules of the system begin managing

the Leads therein. Each time a user enters their user identification information and password into the database, they are presented with a plurality of options, as shown in Fig. 12. In the event the "My Leads" icon 22 is flashing, the user is thereby apprized that there are Leads in the station(s) to which the user is assigned that require action. Fig. 14 is an illustration of active Leads in a station to which the user is assigned, i.e. the Leads which require attention within the station that caused the icon 22 to flash upon entry of the user into the database. The user may select to view the active Leads among a plurality of parameters, including name, company, station and source. Furthermore, if the user desires or needs to see detail information about any specific Lead, they may utilize their pointer tool to select the specific Lead. Fig. 15 is a sample page illustrating the information on a specific Lead. The information contains fields for the following data company: 402, division 406, first name 408, last name 412, title 414, address and contact specific communication information numbers, source 418, primary station 422, and user assignment information 426. Accordingly, in assessing how to act on the Leads in a station, the user may search and select data via a plurality of fields to attempt to assess how best to approach the active Leads in a station.

Alternatively, upon entering the database, the user may select among a plurality of fields for studying and evaluating the progression of Leads in the database. The selection includes icon 351 for inserting new leads into the database. This includes manually entering each lead and associated pertinent data, as well as importing lists of data from external sources. The user may also choose to edit existing information in the database 352, including contact and company information, i.e. telephone numbers, electronic mail address, street address, search for specific contacts in predefined database fields 354, generate predefined reports or customize reports 350, and export database information or mailing list 356. Furthermore, following the entry and verification of login identification, the user may select to view the administrator hierarchy of the database. This option identifies for the user all authorized administrators of the database in conjunction with their contact information, so the users can institute contact directly with an administrator for any required changes to the database or other administrator only functions. Accordingly, the main menu functions as a mapping interface for guiding users through the tools

available in the database for managing and tracking all sales and marketing Leads through all stages of an effective marketing campaign.

Entering Leads

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Following the establishment of accounts for the users authorized to enter the database and monitor the progress of the Leads therein, it is critical to manage how marketing Leads enter the database and from which sources. Marketing Leads may be generated in differing numbers and from a variety of sources. Leads may be acquired and entered individually or they may be acquired in bulk. For Leads which are manually entered into the database, all the pertinent information is manually entered into a form with predefined fields, or user selected and/or custom designed fields. An example of such a form is illustrated in Fig. 7. The form has several fields which require information, and additional fields which are optional for entry of the Lead into the database. As shown in Fig. 7, the required fields for entry are first name 92, last name 94 and source 96. Although the form allows for entry of additional fields, completion of the information in these fields is optional and is not required for management of the Lead through the established workflow.

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One of the required fields for completion of the entry of a Lead is the source 96. The assignment of source for each Lead determines the initial station in which the Lead will originate in the workflow system. As will be explained in the workflow section of this document, each Lead originates in one of three workstations. The source field determines the originating station and thereby determine the initial action to be taken on the Lead. Accordingly, the system is designed to allow for manual entry of individual Leads into the database and assignment of the initial station where the Lead will originate through the system's predefined workflow rules.

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In addition to manual entry of Leads, the system is further designed for mass import of Leads from external lists. When importing a list, all Leads in the list are brought into the database through a mapping wizard which functions as a point and click tool. The mapping wizard is essentially an on-line form for automatically directing the input of information from

specific record fields on new Leads into the database by matching fields from the list to be imported to corresponding fields of the database. A sample of the mapping wizard is illustrated in Figs. 8 and 9. The forms generally include a plurality of fields for importing all critical information for a Lead, as well as additional fields which may be mapped by the user to import additional information which may be contained in a particular import list. The form includes fields for the originating station assignment 102, source 96, and selection of existing maps 104. In general, when completing the source field, if the source has been predefined each of the Leads will automatically enter one of three predefined stations. However, if the source is not user or administrator predefined, the user or administrator must define the source which will in turn assign the originating station to the Leads being imported. Since each Lead enters the system in one of three stations, and these stations differ depending upon type of source, it is important to define the source together with the originating station. Following the completion of fields 102, 96 and 104, the user must select the next button 106 in order to select the file to be imported into the database. In addition, different lists may comprise different formats for entry of Lead information. If the format is predefined, the person working on the import may select the predefined format from an existing map 104. The existing map compares the fields from the list and matches the fields of the list with the fields of the system database. In general, the predefined map functions as a macro and matches the fields of the list into the system database. If the format of the list does not match with an existing map, a new map may be created, i.e. a new macro may be defined, as illustrated at 108. Furthermore, in an alternative embodiment, the user may import data that does not match with the predefined fields of the database. Upon importing such data, any new fields which do not match the predefined field are added into the Lead capture screen and are amended into the records of the database.

After an existing map or a new map has been selected or created, the user is then prompted to selecting the file to be imported into the database. A sample of the import file selection is illustrated in Fig. 9. The user may enter the file name 112, or the user may browse 116 from a select group of files. The browsing option is desirable when the user may be selecting several files or cannot remember the spelling or location of the file name. The user

must then select the submit file button 118 in order for the database to import the file as illustrated in field 112. Following the creation of the macro, the list is imported into the Lead database in accordance with the parameters set for the predefined or assigned source associated with the import list. Accordingly, the mapping wizard functions as a tool for accommodating data transfer of Lead information from an external source into the workflow database, wherein each Lead transferred into the database is assigned to an initial station based upon the definition of the source of the Leads contained in the list.

As indicated, it is common to receive Lead information from a variety of sources, including mailing lists and trade show lists. It is common for attendees of trade shows to be provided with an identification badge having a magnetic stripe encoded with pertinent business information pertaining to the details of the attendee, including company name, geographic location, products and/or services of interest, and specific contact information. The database is designed to have a card reading tool attached thereto through a communication link, or later connected to the database through a communication link, wherein the card reading tool assigns the attendee information stored in the magnetic stripe to the fields of the database. When importing Leads from an external data transfer, it is common to find a variety of inaccuracies or missing information. Every company has a different standard and protocol for maintaining their individual databases and these might not correlate exactly with the database. One of the preferred embodiments of the invention is the ability to validate the accuracy of the information on the list with third party databases in the form of checking for duplicate records. Whether the Lead entries are conducted manually or through a data transfer, the system conducts an automatic check to attempt to ensure that each individual Lead is entered in the database once. The user will be presented with any names that are possible duplicates of names already entered into the database. The user must decide whether or not to add each highlighted the Lead to the database. In the course of checking for duplicate entries upon import, the user entering the Leads is presented with new records and possible matching records within the database. The user may then remove the new Lead from the import or add the name to the database. In an alternative embodiment, the user may select for automatic removal of duplicate Leads. This

selection automatically delete incoming records that are duplicates of pre-existing records of the database. In addition, the user may validate the accuracy of the data in the records or the data being transferred into the records against third party databases, i.e. iMarket and Acxiom. This tool serves to enhance the accuracy of the Lead information being transferred and/or stored in the system database. Accordingly, the database and associated workflow system has the ability to analyze the database in an attempt to ensure that there are no duplicate records for the individual Leads and thereby reduce the possibility of needlessly multiplying the user's efforts in a marketing campaign.

Since Leads are entered into the database both manually and through a data transfer, it is common for Lead information to require editing. Alternatively, a user may want to access a specific Lead in the database to review contact information or superfluous information entered in the comment field associated with the individual contact. Fig. 16 is an illustration of a page for viewing and editing individual contacts. Upon the user entering their name and password, they are presented with the database page as illustrated in Fig. 12. In the event the user desires to view or edit a specific Lead, they must select the edit field 352, after which the user is presented with the menu as shown in Fig. 16. As illustrated herein, the user may view information pertaining to the Lead from a plurality of fields, including, but not limited to contact first name 430, contact last name 432, company name 434, division name 436, source 438, and station location 440. Following a review of the information presented in Fig. 16, the user may select to edit any of the fields present and, if they make any edits, the user must select the submit button 445 following any edits in order for the changes to be entered into the database. Optionally, the user may print the information pertaining to the contact presented in Fig. 16 by selecting the print button 450. Accordingly, the database provide the option of viewing, editing, and/or printing the information pertaining to specific Leads in the database.

In addition to viewing specific Leads, the user may select to view and/or edit information pertaining to a company. Again, the user accesses specific company information by selecting the edit button 352 in the main menu as illustrated in Fig. 12. The user is presented with a view and edit company page as illustrated in Fig. 17. The company page contains a plurality of fields

pertaining to main contact information for the company. For example, the user may view information on the name 460, street address 462, city 464, state/province 466, postal code 468, country 470, email address 472, URL 474, telephone number 476 and comments 478. The user may enter any changes and/or comments that they would like to attach to this company in the database. In the event the user makes any changes to the company profile, the user must select the Save button 480 in order for the changes to be saved in the database. Additionally, the user can print out the company contact information by selecting the Print button 482, or they may move back to the previous page by selecting the Back button 484. Accordingly, the user may select to view and/or edit specific information pertaining to a company in the database, wherein any of the edits may be saved to the database and viewed by subsequent users.

Once Leads are entered into the database, the user may either search the database records for a specific Lead under a plurality of the fields by searching by criteria 138 or searching for all Leads in the database. A sample of the search page is illustrated in Fig. 10. The user is presented with the search page as shown in Fig. 10 after selecting the search field 354 in Fig. 12 from the main menu. The user may conduct a search according to the contact first name 122, contact last name 124, company name 126, Source 128, Station 130, date the Lead was entered into the database 134, and/or the user to whom the Lead is assigned 136. The company name 126, source 128, station 130 and user assignment 136 fields also comprise pull down menus to allow the user to select from data previously entered into the database. The date field selection allows the user to search the database for users entered within a defined time period. The searching capabilities enhance the studies that may be conducted by the users.

In the case of a name query, the system provides a list of possible matches as the system is designed to allow the user to search for exact matches. The user may insert there query into the query box and select to search company names or iterations of the spelling provided by the user. This assists users in finding user and companies with an exact match of the spelling provided or a variety of iterations of the spelling. If a mis-spelling of the information was initially provided, this function attempts to provide a mechanism whereby a Lead would not be lost in the database or improperly managed by the user. Following the selection of search

criteria, the user selects to search by criteria 138 and the system conducts the search and produces the output results of the search. Accordingly, the search criteria provide the option for the user to search the database for specific records defined by the various fields while the system still permits retrieval of all Leads in the database.

5 Searches for duplicate information may be conducted for any of the fields in the records and should not be limited to the company name exclusively. Following the querying of the database, the user is presented with a list of search results for the specific field being searched. If the user requires additional information from the resulting list of Leads, they may select any of the Leads and they will be presented with the record of the specific Lead. The list provided from
10 the query may be printed on hard copy, exported to a secondary file, or used to create a mailing list. The exporting abilities of the generated list provides the capability for generating mailing lists containing all contacts produced by the query. Furthermore, the system allows users to edit the mailing list generated without exporting the list to another application. Accordingly, the system design allows for comprehensive search capabilities within the database as well as
15 editing of mailing lists generated within the application.

The system further provides the ability to query by any of the fields individual or in combination, such as station, date and/or source to generate lists or to study specific records in the database meeting multiple criteria as designated in the search. Once a name retrieved by a search has been selected, the user is presented with the Lead information with the outlined fields,
20 which is equivalent to the form utilized for manually inserting Leads into the database. As with the manual insertion form, the user may utilize a mouse or an equivalent pointer tool and access any of the fields to edit any pertinent information which may be inaccurate or require update. Upon completion of the process of correcting and updating the contact information, the user presses the OK button and the Lead information is updated, storing all changes in the database
25 and replacing the previous record for the edited Lead. All changes to Leads in the database are logged and are thereby subject to audit if necessary to determine information regarding any changes to the database records. Accordingly, the system provides the ability to manually search the database and to edit contact information in an equivalent manner to manually inserting new

contacts into the database and provides a means of maintaining a log of pertinent details regarding each change to aid in ensuring integrity, security and use of the system.

As described and shown herein, Leads may be entered into the DBMS through many sources. Leads may be in the form of individuals, small companies, and/or large companies. Regardless of the form of the Lead, it is important to ascertain the name of the specific Lead who is the contact person to properly manage that Lead. This will generally be the person who has authorization to make and execute decisions on behalf of a company with respect to purchasing and/or accessing the user's goods and/or services. Accordingly, identification of the proper contact assists in focusing any and all marketing efforts on the appropriate parties.

The database stores information pertaining to specific contacts within a Lead and/or within specific divisions of a Lead. It is common for established and/or growing companies to utilize an organizational structure that provides a plurality of divisions within the company. As each division may function somewhat independently with respect to use and acquisition of the user's goods and/or services, it is beneficial for a user to be able to track contact information with respect to each division of a Lead within the context of the Lead itself. Also, it has been known that different divisions of a Lead might have different contact persons for that particular division. As such, the database structure herein resolves conflicts with repeating Lead names that may arise if each division of a Lead were to be entered as an independent Lead in the DBMS by storing the information of a contact and defining the contact name in relation to a division of the Lead while relating the information on division specific contacts to the specific Lead in the DBMS. More specifically, the database comprises a Company Contact Table for organizing and storing records comprising fields for identifying the specific contact within the database in a unique identifying character string for the specific name of the contact. The record also contains a field for associating the specific contact with the related division of the Lead. In addition to the above-identified fields that require a character string, there is also a field for comments which provides a storage location within the contact record generated to optionally insert comments and data associated directly with the contact's record. Accordingly, the Company contact Table resolves the issues for repeating contact names within a company by assigning a

contact identifier in relation to a contact name and linking the specific contact to the related division of the Lead and that divisions specific identifying information.

As is common with growing and/or established companies, it is known to have different divisions for conducting different tasks. Alternatively, some companies may have an interest in more than one product and/or service being marketed. This provides support for multi-tracking of Leads, i.e. allowing a Lead to be in more than one Station for different products and/or services. Accordingly, the database has structure for storing detailed information on the Leads including the divisions of the company and all pertinent contact information pertaining to the division identification.

The database comprises a Division Detail Table for capturing records of the details of a company's hierarchal structure. For example, an information technology company may have a software division and a hardware division, and within each of these divisions, the company may have marketing and sales divisions. It is therefore, critical to define the details of the company's divisions so that the marketing and sales campaign may be properly structured. This table stores the details of each division by identifying the division and associating this with the company's unique identifying character string. The remaining fields in the Division Detail Table referenced above correspond to defining the geographic local of the specific division identified, as the division of the company may be located in a different office and/or building than another division. Accordingly, a Division Master Table stores records of identifying information for specific divisions within a company, wherein the specific identifying company information is predefined in the Company Master Table.

It is critical that the apparatus support the ability to generate mailing lists for contacting Leads in the database or alternative database exporting tools. In general, the user with proper authority may export database information in ASCII format or alternative state-of-the-art data exporting formats, such as ACT! and Goldmine, for a variety of purposes, including, but not limited to, reading information into a new database or a spreadsheet. Additionally, at the heart of all marketing campaigns is the ability to make contact with the Lead. This may take the form of a voice contact or a mailing, either through regular mail or via electronic mail. As such, the

database is designed to allow a user to generate a standard mailing or an electronic mail mailing list. The details for compiling a mailing list are stored in a Mailing List Table which comprises a plurality of fields which may be accessed when compiling the mailing list. As such, each mailing list may be tailored by the user to identifying information stored within the fields of the Mailing List Table, and may be selected from the follow group: First Name, Last Name, Address, State, Country, Postal Code, Telephone Number, Company Name, and Electronic mail Address. The fields of the record allow the user to either select for the mailing list to be generated for a postal mailing or via electronic mail. In addition to the preset fields identified above, the system may be modified to incorporate additional or alternative fields, and as such the scope of the invention should not be limited to the fields identified in detail herein. Accordingly, the database supports the ability for users with granted authority to select parameters for exporting data and/or compiling mailing lists.

As noted, in conducting effective marketing it is critical to establish contact with Leads in a plurality of formats, as well as track the source of each Lead. This allows you to evaluate the effectiveness of your sources, as well as determine alternative marketing avenues. The apparatus is designed to allow you to track such information. The database record for storing source information is defined in the Source Master Table which is a master record for storing information pertaining to the source from which a Lead may originate together with the Lead's originating stage in the marketing campaign. It is important to store the source information for each contact so that the company may later evaluate the success rate they have achieved from the different sources, and possibly re-evaluate their own marketing avenues if deemed necessary. Accordingly, the Source Master Table outlines the structure of the record for storing the source from which all contacts originate and the Stations in which they lie as they are introduced into the marketing campaign.

Once a Lead has been entered into the database, the apparatus herein provides a method of tracking marketing and sales Leads through a plurality of Stations. Each of the Stations within the system have a time limit in which an action, such as a product and/or service promotion or campaign, on the Leads within the Station must be taken. The system provides for entry of

product promotion and/or campaign information within individual Leads. This allows for campaign and product promotion strategies to be evaluated. In a further embodiment of the invention, the system, comprises a personal calendaring system for the users monitoring the Leads in the database. The personal calendar provides users the ability to schedule tasks and reminders to themselves regarding contact and follow-up on assigned Leads. Additionally, the user may institute a visual profile of Lead information in conjunction with or separate from the personal calendar. After an action has been taken and a reaction ascertained and evaluated, the Lead progresses to a select subsequent station. In general, Leads progress through the workflow within the predefined time limits and are moved to subsequent stations through proactive marketing measures. However, in a further embodiment of the invention, the user of a specific station may select to recycle a Lead through the same station as part of the active decision making process of the user. Each Station is monitored by a Station Master, wherein the Station Master may supervise one or more Stations. Authority for Station Master are defined and stored by the administrator. The supervision of each station helps minimize the chance that Leads are not potentially lost in the workflow. Accordingly, the hierarchical structure of the workflow enhances the ability to properly manage multiple Leads within a single workflow system.

The Station Master is responsible for monitoring the Leads within their assigned Stations, ensuring that the marketing personnel (in the form of users) assigned to specific Stations, actively market to the Leads in their Stations during the time allotted. The Station Master is also responsible for taking action on Leads which remain in a Station beyond the predefined time limit. For all Leads which remain in a Station beyond the proscribed time limit, an alert is generated in the form of an electronic mail which notifies the Station Master, or some other person who has been established to receive and act on all tardy and neglected Leads. The Station Master must then actively ensure that the appropriate action is taken on the Lead. Accordingly, the person assigned to receive all notifications of tardiness and neglect from a station, acts as a supervisor for monitoring the activity in that Station and ensuring that the workflow of that station is properly managed.

Based upon the predefined actions and/or results of those actions, a Lead may be moved

to a different Station. As such, each Station defines a particular stage that a Lead is currently in within the campaign itself and further defines the period of time in which they may remain in the Station before an error occurs. The database comprises a Station Detail Table which is a master table for storing records of information pertaining to the details of the specific predefined Station names, corresponding Station identifier and constraints of each Station. Accordingly, the Station Detail Table functions to organize the workflow time limits assigned to each station.

Each record outlined above has fields for storing information pertaining to each Station. As discussed earlier, each Station has a Station Master who monitors the progress of each Lead in a particular Station. In addition to the Station identification, the system further comprises a Station name. Since the apparatus is not a static system, but rather defines a set of rules for tracking Leads, the record has a field for storing the electronic mail address of the user assigned to the Station defined herein. This allows the user responsible for managing the Leads in a defined Station to receive all communications of active Leads in their Station via electronic mail. However, in the event a Lead remains in the Station beyond a predefined time limit, the apparatus has a field containing the necessary information for sending notification of Leads which have exceeded the allotted time for that specific Station. This electronic mail address may be the same as that provided for the user assigned to non-mature Station Leads, or it may be different. In most circumstances, it is preferable that these two user identification electronic mails should differ as it is recommended that a manager, i.e. Station Master, oversee the marketing campaign and be notified of all Leads that remain in any one Station beyond the time permitted in order to take the necessary action to correct the situation.

In addition, the Station Detail Table stores the duration in which a Lead may remain in the defined Station. Each Lead in the apparatus progresses through the different Stations as it moves through the workflow system. As such, each defined Station has a field for defining the current Station and the next Station in which a Lead is transferred following successful completion of all the tasks assigned to the existing Station in conjunction with a move date field documenting the date in which the Lead progresses to the subsequent Station. The move date field identifies and stores the arrival date of a Lead into a specific Station and sets the predefined

time limit for this Lead. Accordingly, the Station Detail Table maintains records of information pertaining to each defined Station, the duration a Lead may actively remain in a specified Station, which Station the Leads moves to following an exit from the current Station, and on which date such a move occurred.

5 The description provided above is a template of the structure and organization of the database for managing and tracking sales and marketing Leads. Each Lead in the system is placed in a Station which defines the status of the Lead as well as the action required of the marketing department on the Lead in order to move the Lead through the workflow system. In general, Leads move from one Station to another eventually ending up as either a sale or as a rejected contact. Each Station in the system is defined by paths directing Leads into the Station and out of the Station, as well as setting a duration in which a Lead may remain in any one Station. As discussed above, if a Lead exceeds their duration in a particular Station, messages and/or alerts are generated and sent to predefined individuals requesting action be initiated on the Lead. The messaging and alarm system acts as a fail safe for ensuring that Leads do not remain idle in the system for a greater period of time than is optimal given a Lead's characteristics. Furthermore, the work flows ensure that marketing personnel or the marketing department receive notification at periodic intervals to maintain the marketing campaign within the time line programmed into the system and each predefined Station. However, it should be noted that the duration of a Station may be modified to adapt the system to a specific campaign need and can thereby be customized to maximize the success of a given marketing campaign.

Workflow Rules

25 Following the entry of data information on Leads into the data base and the relevant fields therein, each Lead in the system may then be tracked and managed for a marketing campaign. A workflow application, herein defined as a method of tracking a Lead through a campaign overlaps the database. The workflow application applies a predefined set of business rules to the Lead information. Accordingly, the business rules are divided into a set of Stations,

wherein each Station defines the status of a Lead within the marketing campaign.

The following is a detailed description of each predefined workflow Station of the preferred embodiment illustrated in Fig. 1. In the example given, there are three critical Stations for inputting Leads into the system. Station 1, illustrated in Fig. 1 at 210 is predefined for Leads that have been blindly acquired through a marketing campaign, such as through a purchased mailing list. All Leads who enter the system in Station 1 are new contacts and possess an innocent perspective, i.e. they do not have a prior introduction to your company and/or its products or services. For purposes of this illustration, each Lead entered into Station 1 has a predefined limit of thirty days in which they remain in this Station prior to have an alert generated. As such, the marketing personnel assigned to Station 1 Leads have a thirty day window in which to make first time marketing contact with the Lead. Station 2, illustrated in Fig. 1 at 215, is predefined for Leads who have acquired knowledge of the company and their products and/or services. These Leads essentially have an informal introduction to your company. A Lead in Station 2 may have originated from a seminar or trade show where the company had a representative or an exhibition wherein some introduction has been made by the company. For purposes of this illustration, each Lead entered into Station 2 has a predefined seven day limit in which they may remain in this Station prior to having an alert generated. As such, the marketing personnel assigned to Station 2 Leads for a specific marketing campaign have a seven day window of opportunity to initiate a marketing contact with Station 2 Leads prior to having an alert generated. Finally, Station 3, illustrated in Fig. 1 at 220, is predefined for Leads who have prior knowledge of the company and the products and/or services they are offering. Each of the Leads entering at Station 3 have taken a form of proactive steps to become acquainted with your company and your products and/or services. Such an inquiry could have been initiated through a standard form of communication, such as an inquiry over the Internet, a telephone call, a facsimile transmission, e-mail, etc. For purposes of this illustration and in view of the fact that Leads originating in Station 3 are familiar with the company and have taken a proactive step in initiating contact, the marketing personnel are provided a predefined 2 day window from the Leads initial communication with the company in which to reciprocate contact.

Accordingly, Stations 1, 2 and 3 define the source which sets the origination of each Lead into the system, and the status of each Lead by it's presence in the initial Station will determine how a marketing campaign is applied to a specific Lead.

Following the placement of potential Leads into the system in the appropriate Station (1, 2 or 3), a marketing campaign is initiated on that Lead. For all new Leads in the system, each Lead is generally contacted through a telemarketing person, direct mail pieces, or an alternative active contact representing the company. After the first contact is established, each Lead is moved from their initial Station of 1, 2 or 3 into an appropriate subsequent Station based upon the interest projected from the Lead to the marketer upon initial contact. This ensures that all new contacts which have been brought to the attention of the company pass through at least one round of a marketing campaign and that this initial marketing campaign is not repeated with the contact since that contact is subsequently removed from that Station into a different Station within the system. For a marketing campaign to be effective, it is critical that each Lead be contacted within the time allotted. When contact has been established with a Lead it is documented in the database. If no date of contact is provided during the allotted time for a Lead in a Station as referenced in the Suspect Detail Table for this Station, an alert is forwarded to the Station Master or another predefined person assigned to supervise tardy and neglected Leads so that immediate action may be taken. Accordingly, only following an initial contact with Leads in one of Stations 1, 2 or 3 are the Leads moved to a subsequent Station.

The Station designated as Station 4, indicated at 225, is a Station in which Leads are placed if an initial communication has been attempted, but did not result in any contact with the specific Lead. Leads placed in Station 4 may originate from any one of Stations 1, 2 or 3. For purposes of this illustration, once a Lead is placed in Station 4 they are allowed to remain in this a maximum of ninety days. During this 90 day period, the user assigned to Station 4 Leads is expected to attempt to establish contact. Following the ninety day period, if recordation of contact with the Lead has not been documented in the database an alert will be generated indicating that contact with the Lead has not taken place and the allotted time for such contact has been exceeded. This alert notifies the Station Master assigned to this Lead and/or project to

rectify the situation by making contact with the Lead or taking other appropriate action to move the Lead to a subsequent Station.

The Station designated as Station 5, indicated at 230, is a Station for Leads which originated in Stations 1, 2 or 3, and may have also been moved from Station 4. Each Lead placed in Station 5 has had a formal introduction to the company and its products and/or services, but requires further qualification as to the product and/or service which are being marketed. As such and for purposes of this illustration, Station 5 has a maximum period of thirty days in which the Lead may remain prior to exceeding the time limit and an alert being generated and forwarded to the Station Master. The tardiness alert associated with Station 5 indicates that the Lead in this Station has exceed their time limit and that contact from the marketing personnel has not be initiated. If an alert is forwarded to the Station Master, it is their responsibility to insure that contact with the Lead will be initiated and by whom.

The Station designated as Station 6, indicated at 235 is a Station for Leads which originated in Stations 1, 2 or 3 and may also have been transferred from Stations 4 and/or 5. Each Lead in Station 6 is considered a 'warm' Lead and a good prospect for the marketing campaign. Leads which have been placed in Station 6 are considered to meet the profile of a good prospect, but also a prospect who is not yet ready for a follow-up from the sales team. For purposes of this illustration, this Lead is placed on a thirty day follow through cycle, meaning that this Lead should be contacted by the marketing department at least once every thirty days and placed on the company's mailing list. In the event, this Lead is not followed through within the thirty day cycle, an alert is generated informing the Station Master that the Lead has not been contacted once during the last thirty day period and it has therefore exceed the time limit set in this Station. If an alert is forwarded to the Station Master, it is their responsibility to insure that contact with the Lead will be initiated and by whom.

The Station designated as Station 7, indicated at 240 is a Station for Leads who are not the final decision makers for purchase of your product and/or service, but may have good influence with the purchasing personnel for their company. This Lead is a person who should be maintained as a focus of the marketing campaign and on the active mailing list. However, for

purposes of this illustration, it is recommended that this Lead should not be followed up by direct contact more than once every 120 days. In the event a period of 120 days passes and contact with this specific Lead has not been initiated, the marketing personnel responsible for this Lead with respect to the marketing campaign will receive an alert informing them of the missed communication.

The Station designated as Station 8, indicated at 245, is a Station for Leads that are recommended to be placed on the general mailing list of the company. This Lead may enter Station 8 from any one of Stations 1-7. This type of Lead is a person or company interested in the products and/or services provided by your company. For purposes of this illustration, it is recommended that this Lead be followed up at least once every year. In the event a period of one year passes and contact with this specific Lead is not indicated in the database, an alert will be generated and forwarded to the Station Master indicating that this Lead has exceeded their time at this Station without any contact from the marketing personnel.

Stations 4-8 are staging areas for prospective clients of a company. Each of these Stations is under the control of the marketing department exclusively and requires monitoring during the time allotted. If a Lead exceeds their allotted time in any of the above noted Stations, an alert is generated and forwarded to the Station Master, or another predefined person assigned to tardy and neglected Leads who exceed their proscribed duration in a specific station. The predefined person assigned to tardy and neglected Leads may then manage the identified Stations and Leads therein so actions may be taken to make contact with the Leads and not to allow the Lead to fall outside of the parameters set forth in the marketing campaign. Accordingly, Stations 1-8 provide a monitoring system in which Leads are classified depending upon their interest in the company's products and/or services so that they may be contacted at appropriate time intervals to encourage a positive relationship between the company and the Lead and to move the Lead into a prospective sale.

Following the tracking of a potential Lead by the marketing department it is desirable to have the Lead mature into a prospective client for the sales department. Although not all Leads will become sales, the system has a staging process wherein the Leads are tracked through the

marketing department and moved into the sales department, maintained in the marketing department, or removed from the system as not portraying any interest in the products or services provided by the company. The Stations designated herein as Stations 9, 10, 11, 12 and 13 are reflective of the staging Stations in which Leads may be transferred pending the results of the marketing campaign conducted in Stations 1-8. Each of the remaining Stations are defined as follows:

The Station designated as Station 9, as indicated at 250 is a staging area for Leads which are considered very interested in the product and/or services provided by the company. A Lead which has been placed in Station 9 is transferred into the sales department, where sales personnel can work to promote the sale of the products and/or services of the company. At this point the Lead is essentially transferred to the sales department and is no longer the responsibility of the marketing department. Accordingly, parameters governing the sales department management of the Lead will take effect.

The Station designated as Station 10, as indicated at 255 is a staging area wherein the Lead has been transferred from the marketing department's current marketing campaign into limbo by the sales department. For a reason which must be provided by the sales team, the sales department is not actively interested in pursuing this Lead at this time. The sales department for a justified reason has determined that this Lead should remain within the workflow Stations of the marketing campaign, and is not ripe for transfer into a current sales campaign. This Lead is considered as a prospect for future marketing campaigns. These possible reasons may include financial constraints, positioning of the Lead, or their need for the company's products and/or services. Accordingly, the sales team is releasing the Lead to the marketing department and the Lead is likely to be placed in Stations 6 or 11 at a predetermined time so that the Lead is not completely lost to the company.

The Station designated as Station 11, as indicated at 260, is a hybrid staging area for the sales and marketing teams. In this workflow space the Lead is being worked on by the sales team, but not proactively, and not to the extent that it is advisable to fully transfer the Lead into the sales department. This Lead is essentially followed by both teams. For purposes of this

illustration, the marketing department maintains these Leads in a thirty day cycle. In the event the Lead has not been contacted by either the sales or marketing teams within this thirty day cycle, an alert is generated and sent to the Station Master of the marketing team and the sales manager, or another predefined person assigned to tardy and neglected Leads who exceed their proscribed duration in this specific station, for notification of a tardiness in communication so that proper action may be taken.

The Station designated as Station 12, as indicated at 265, is a Lead wherein a sale has been transacted. This Lead may have entered the system from any of the predefined Stations, and will remain in workflow management for future marketing and sales campaigns. Following completion of the sales transaction this Lead remains in Station 12 until the next campaign when they again enter the workflow in Station 3.

The Station designated as Station 13, as indicated at 270, is the workflow space where Leads have been processed through the workflow and no sales is being pursued or a sale has been pursued to no effect. In either event, it has been determined that this Lead is not interested in the products and/or services being marketed and this Lead will not be interested in any future marketing campaigns from this entity. Accordingly, all Leads who are placed in Station 13 remain in the database at this Station so that their names are not re-entered in the system.

In each of the above-defined Station work flows, there is a company defined time limit within which each Lead may remain in the specific Station. If the Lead exceeds this predefined time limit, a message via electronic mail is sent to the individual managing that particular Station, i.e. the Station Master, informing them of the tardiness of specific Leads in the Station. The electronic mail message will indicate all Leads in a specific station that have remained in the station beyond the predefined time limit for that station. One electronic mail message will be generated per station with all expired Leads in the message. The electronic mail message alerts are sent to the person assigned to manage the station's tardy Leads. In addition, a second electronic mail message may be sent to the same or different people as well depending on the parameters set for the Station, i.e. Station Master, user, administrator, etc. The Station Master or relevant mail recipient is then provided the option of initiating contact or providing a shortened

time period for the user assigned to the Station and Lead to make contact. Accordingly, the time constraints are used as a guidelines for effective marketing and any alerts generated may be used in evaluating performance of the marketing campaign and/or production of the user.

5 **Generating Reports**

In view of the fact that the system is designed to track and manage Leads for marketing and sales teams, it is critical that the apparatus comprise the ability to generate reports to the managers of the marketing and sales campaigns and other personnel in need of such data.

10 Reports may be generated based upon a variety of fields in the records. For example, it may be advantageous to review how Leads are progressing based upon the source of the Lead, review the Leads in a particular Station, or generate an aging report. In addition to preselected report generation, the manager or user of the system also has the ability to custom generate reports based on the different fields in the records of the database. Accordingly, a manager and/or user of the system who has proper authority within the system may generate reports to review the
15 progress or lack thereof of Leads in the database.

When the user enters the database and has successfully entered their name and password, they are presented with the main menu of the database and workflow of the invention. The user has an option for selecting among various tool 356 available for managing and evaluating the
20 leads in the database. An illustration of the report parameter selection is provided in Fig. 11. As shown in Fig. 11, the user may select the following parameters to include in the report generation: source 310, station 314, aging by source 316, aging by station 318, and aging by Lead 320. One common area for review is the source from which the Leads entered the database. As in any marketing campaign, it is critical to review the progress of specific Leads
25 from a particular source. This assists a sales and marketing team in evaluating whether particular sources are beneficial to the products and/or services they are attempting to sell. It is always wise business practice to ascertain the productivity of your marketing and which sources are advantageous to the sales of your goods and/or services. The user can select for a report to

be generated based upon all or select sources. The user may request to view all information available for Leads generated from a specific source. Alternatively, the user may select for a report to be generated from a specific source and the Stations wherein the Leads from that source are currently held. A report generated based upon the source and Station status will show the user the source, the number of Leads currently stored in the database originating from the source, wherein the report will further indicate the Station status for each Lead as well as a total number of Leads in the database from that particular source. Once the user selects the parameters of the report from the fields available for selection, the user must select the corresponding run report selection button 325 associated with each field selected. Accordingly, the report generated based upon the source of a Lead provides the user with a range of data to assist in ascertaining the benefits associated with obtaining Leads from a particular source.

In addition to reviewing how Leads are progressing through the tracking system based upon the source of the Lead, the apparatus further comprises the ability to generate a report based upon the aging of Leads in specific Stations. The user can select a specific Station and review the Leads that are being held in this Station at that particular time. The system will then generate a report in the form of a graph presenting the average time each Lead which is currently in this Station has been in this Station, together with the shortest amount of time any of the current Leads have been in this Station and the longest amount of time any of the Leads have been in this Station. In addition to a Station aging report, the system also has the capability to provide Station reports. The user can select a specific Station and further refine the report to illustrate which fields in the database they want to view. The report generated upon such a specified query will indicate the Station selected, the number of Leads in the Station listed by source, and the aggregate number of Leads in the Station at the time the report was generated. Accordingly, the system may query the database for providing a graphical or written presentation of the status of the Leads in a particular Station.

Aging reports are a critical embodiment of the report generating capabilities of the database system. In a system which manages time allocation for tracking Leads, it is important to review the aging by a variety of fields in the database including, but not limited to, aging by

Lead, source and Station. Each of these predefined aging reports can assist the user and/or manager of the marketing and sales campaign for more effectively targeting their audience. For example, if the user selects to generate an aging report of a particular source, the user selects a source from the list of sources in the database, and the report will provide a total for the number of Leads in the database across the Stations. In addition, the system will illustrate in a graph presentation the aggregate time per Station for the Leads generated from the specified source. This provides the capability for ascertaining the marketing benefits the user is developing from Leads generated from a specific source.

The final predefined report in the system is a report which generates aging information defined by individual Leads in the database. For example, if the user wants to review how a specific Lead has evolved through a marketing and sales campaign, the user can elect to generate a report on a specific Lead wherein the system will prompt the user to enter the information for the Lead. The user will then be shown an aging report illustrating the time the Lead has taken in each Station to date.

Although the system provides an array of predefined reports available for the user, the system is not limited to those reports defined above and illustrated in the attached drawing figures. The database is a relational database comprised of a plurality of fields within the records. As such, the user of the system may query the database to custom generate reports based upon the predefined fields therein. For example, the user can select for a report to be generated based upon the source, Station, dates, geographical data or based upon any of the predefined fields. In addition, the user can select for the report to be presented to the user in either a graphical or chart format. This provides the ability for the system to generate different formats for review by the user. Accordingly, the system is not limited to the predefined reports herein and comprises the ability to generate custom queried reports based upon user selected fields in the database.

In addition to allowing the user authorization to request and generate reports from the database, the user may request for the database to automatically generate reports on a periodic basis and distribute the reports via electronic mail and hyperlinks. This embodiment allows an

authorized user to set up a schedule for the database to automatically generate reports based upon the parameters selected. Fig. 12 is an illustration of the autogenerating report selection menu. The user selects the Autogen field 350 from the main menu reports option shown in Fig. 12. The user is then presented with the menu illustrated in Fig. 13 and is prompted to review existing maps 360, to delete any users from viewing electronic reports on the auto generation 364, select the date range for the report 368, and to select the frequency of updates between reports 372 so that the system will generate subsequent reports based upon the predefined frequency. In view of the fact that these reports are automatically generated, it is critical that the reports are forwarded directly to the user so as not to be neglected. As such, the user may select 364 for specific users to be deleted from the Autogen report mailing list. Once the user has selected the options available in fields 360, 364, 368 and 372 the user must select the create new report button 376 in order for any of the changes selected to be saved and actions to be taken. In a further embodiment of the invention, the user has the option of selecting the print mode for the report and request that the report be forwarded directly to their printer and/or their electronic mailbox via electronic mail. The benefit associated with forwarding the report electronically via electronic mail serves as a reminder when the user checks their electronic mail box, and also allows them the option of either viewing the report on their computer monitor or printing the report and reviewing a hard copy at a later date. Accordingly, the system is adapted to allow a user to request periodic generation of reports based upon pre-selected or custom selected parameters from the fields of the database.

The database disclosed above in conjunction with the business model illustrate an apparatus and method comprising a set of rules for tracking prospective marketing and sales Leads. The details of the invention described herein are merely those of a preferred embodiment of the invention. It will be appreciated that the present invention is not limited to the exact construction that has been described above and illustrated in the accompanying drawings, and that various modifications and changes can be made without departing from the scope thereof.

I claim:

1. A method for managing contact information, comprising the following steps:
entering customer information into a database;
placing individual customers in workflow stations;
contacting customer within a specified schedule for introducing product information; and
processing customer information and feedback and moving said customer to a subsequent
workflow station based upon said feedback.
2. The method of claim 1, wherein said product information is manually entered into said
database.
3. The method of claim 1, wherein said product information is imported into said database
in a data transfer.
4. The method of claim 3, wherein said data transfer is an electronic transfer of data through
a communication link of multiple computers.
5. The method of claim 1, wherein said customer is a marketing Lead.
6. The method of claim 4, wherein entering customer information further comprising the
step of indicating source origination of the customer.
7. The method of claim 6, wherein said source origination for said customer is
determinative of initial station location.
8. The method of claim 1, further comprising the step of sending a communication to a
station supervisor upon failing to contact customer within defined station duration.

9. The method of claim 8, wherein said communication is in the form of an electronic mail message.
10. The method of claim 1, further comprising the step of generating a reports on progression of individual customers through said workflow.
11. The method of claim 10, further comprising forwarding said report to a supervisor through an electronic mail message.
12. The method of claim 11, further comprising attaching said report as a hyper text mark-up language in said electronic mail message.
13. The method of claim 10, further comprising the step of establishing an automated periodic generation of reports of customer progression at established time intervals.
14. The method of claim 10, wherein said report is customized by an authorized user from a plurality of database fields.
15. The method of claim 14, wherein said fields are selected from the group consisting of all sources, specific sources, all stations, specific stations, aging of customers in said database, dates, geographical data, and combinations thereof.
16. The method of claim 14, wherein said report is presented to an authorized user in a graphical format.
17. A workflow management system for tracking sales and marketing customers, comprising:
entering customer information into a database;
placing each customer in an initial station based upon source of said customer;

initiating contact with said customer and introducing product information within a specified duration;

moving said contact to a subsequent station following initial contact based upon reaction of said contact;

5 generating an alert if said customer remains in a station beyond a predefined duration; and

managing said contact through a plurality of stations to ensure proper introduction of product information within predefined durations for each of said stations.

10 18. The system of claim 17, wherein said customer originates from a purchased list.

19. The system of claim 18, wherein said customer enters said database in station one.

15 20. The system of claim 19, wherein an alert is generated if said customer remains in said initial station in excess of thirty days.

21. The system of claim 20, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.

20 22. The system of claim 17, wherein said customer originates from a commercial event.

23. The system of claim 22, wherein said customer enters said database in station two.

25 24. The system of claim 23, wherein an alert is generated if said customer remains in said initial station in excess of seven days.

25. The system of claim 24, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.

25. The system of claim 17, wherein said customer enters said database from personal contact.
26. The system of claim 25, wherein said customer enters said database in station three.
27. The system of claim 26, wherein an alert is generated if said customer remains in said initial station in excess of two days.
28. The system of claim 27, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.
29. The system of claim 17, wherein contact with customer in an originating station was attempted without establishing actual customer contact.
30. The system of claim 29, wherein said customer is transferred to station four.
31. The system of claim 30, wherein an alert is generated if said customer remains in said station in excess of ninety days without establishment of contact from marketing personnel.
32. The system of claim 31, wherein a subsequent station is selected from the group consisting of station five, station six, station seven and station eight.
33. The system of claim 17, wherein contact with said customer was established at said originating station and said customer requires further qualification of product.
34. The system of claim 33, wherein said customer is transferred to station five.

35. The system of claim 34, wherein an alert is generated if said customer remains in said station in excess of thirty days without establishment of contact from marketing personnel.
- 5 36. The system of claim 34, wherein a subsequent station is selected from the group consisting of station six, station seven, station eight, station nine, station ten, station eleven, station twelve and station thirteen.
- 10 37. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is moderately interested in said product.
38. The system of claim 37, wherein said customer is transferred to station six.
- 15 39. The system of claim 37, wherein said contact is contacted at least one time within a thirty day period.
- 20 40. The system of claim 38, wherein a subsequent station is selected from the group consisting of station seven, station eight, station nine, station ten, station eleven, station twelve and station thirteen.
41. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer may be influenced to purchase said product.
- 25 42. The system of claim 41, wherein said customer is transferred to station seven.
43. The system of claim 42, wherein said contact is contacted at least one time within a one

hundred twenty day period.

- 5
44. The system of claim 43, wherein a subsequent station is selected from the group consisting of station eight, station nine, station ten, station eleven, station twelve and station thirteen.
- 10
45. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is interested in said product
- 15
46. The system of claim 45, wherein said customer is transferred to station nine.
47. The system of claim 45, wherein said contact is transferred to a sales representative,
- 20
48. The system of claim 46, wherein a subsequent station is selected from the group consisting of station ten, station eleven, station twelve and station thirteen.
49. The system of claim 17, wherein said customer was transferred to a sales representative and subsequently rejected by said sales representative.
- 25
50. The system of claim 49, wherein said contact is transferred to a marketing representative.
51. The system of claim 50, wherein a subsequent station is selected from the group consisting of station eleven, station twelve and station thirteen.
52. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is not interested in said product and remains in said workflow.

53. The system of claim 52, wherein said contact is transferred to station eleven.
54. The system of claim 53, wherein said contact must receive communication from a marketing representative within thirty days of arriving in said station prior to generation of an alert to a station master.
55. The system of claim 54, wherein a subsequent station is selected from the group consisting of station twelve and station thirteen.
56. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said contact is a customer.
57. The system of claim 56, wherein said customer remains in the database for subsequent marketing campaigns.
58. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said contact is not interested in product information.
59. The system of claim 58, wherein said customer is removed from the database for any subsequent marketing campaigns.
60. A computer readable medium having computer executable instructions stored thereon for performing the following steps:
entering a plurality of records into a relational database;
entering records of said database into a workflow management system for monitoring and managing Leads defining said records through a predefined cycle;

acting on said Leads within predefined intervals; and
moving said Leads within said workflow based upon actions on said records and
reactions of said records.

- 5 61. The computer readable medium of claim 60, further comprising generating tardiness
messages to managers of the workflow management system for all records indicating lack
of communication from a defined user.
- 10 62. The computer readable medium of claim 61, further comprising generating reports for
analyzing progress of records through said workflow.
63. The computer readable medium of claim 62, wherein said reports are automatically
generated at predefined intervals.
- 15 64. The computer readable medium of claim 62, wherein said reports are custom defined
based upon user selected fields of the database.
65. The compute readable medium of claim 60, wherein said database providing support for
import of records from external sources.
- 20 66. The computer readable medium of claim 60, wherein said database further providing
support for exporting database records into mailing lists.
67. The computer readable medium of claim 65, further comprising providing for automatic
validation of import data information.
- 25 68. The computer readable medium of claim 67, further comprising providing fo automatic
removal of duplicate data information.

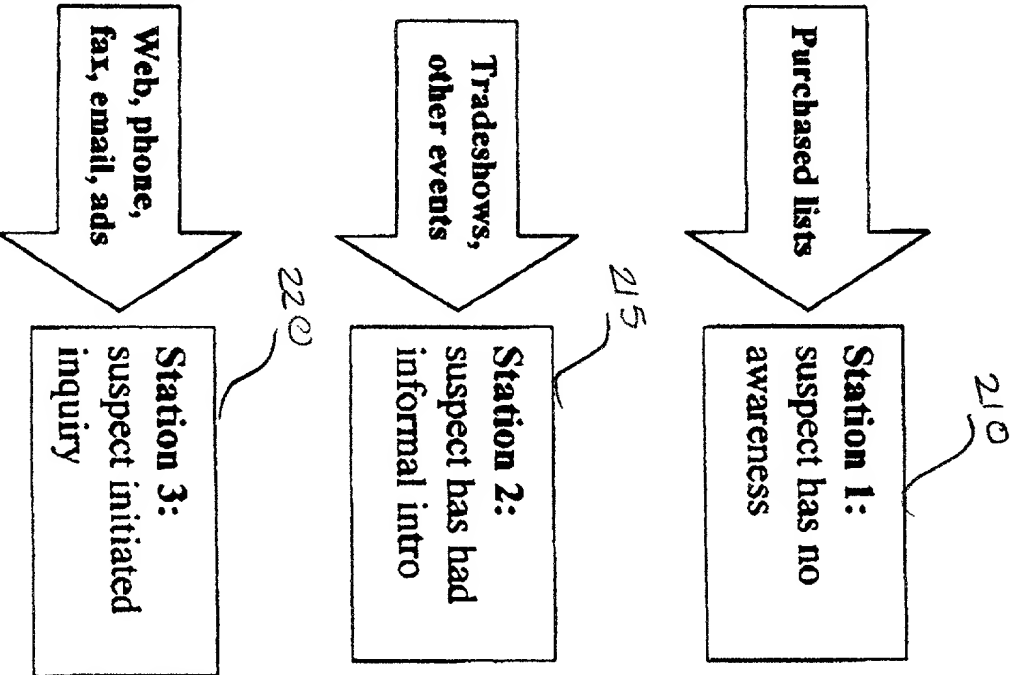
Express Mail Label No.: EK679799833US
Date of Deposit: August 16, 2000

69. The computer readable medium of claim 60, further comprising providing for managing of an individual Lead through said workflow in independent cycles.
70. The computer readable medium of claim 60, further comprising providing for custom defining workflow rules.
71. The computer readable medium of claim 60, further comprising a personal calendar for reminding users of the database of tasks to be performed on select records.

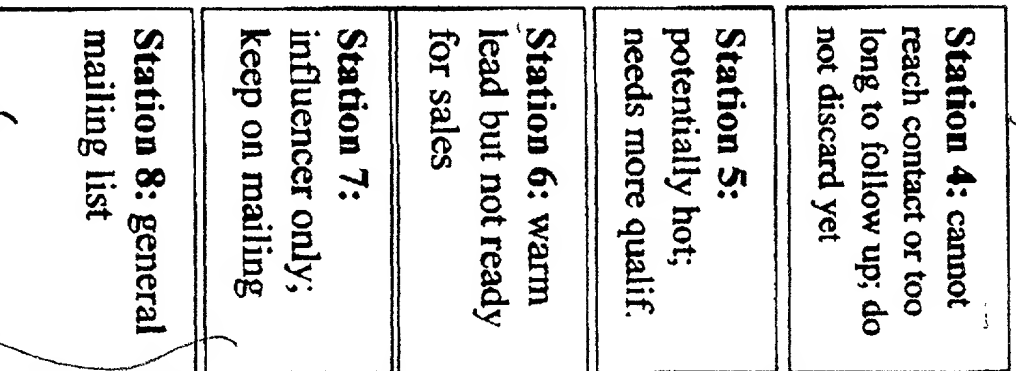
ABSTRACT

A database in conjunction with a workflow management system is provided to store information on a plurality of potential customers and to manage each potential customer through a marketing and sales campaign. The product is designed to be hosted by either an Internet Service Provider ("ISP") or an Application Service Provider ("ASP"), and may also be accessible through a global computer network. Alternatively, the product may be hosted on a company specific server with browser front-end access via an Intranet Server or a computer connected to a local area network. The accessibility of the product enables account holders to view the status of their potential customers from anywhere around the world at any time. Potential customers may be entered into the database either manually or through an import from an external source. The origination of a potential customer in terms of how they came to the attention of the marketing personnel is determinative of where they originate in the workflow. As the potential customers are tracked through the workflow they are contacted by marketing personnel and, based upon the reaction provided by the potential customer, the customer progresses to different areas of the workflow. In addition, should the marketing personnel responsible for any specific lead at a particular station within the workflow be tardy in establishing contact with the potential customer, a message is automatically generated and forwarded to a person responsible for supervising the assigned marketing or sales personnel. The database further comprises report generating capabilities for generating custom reports upon request, or generating periodic reports at programmed intervals. The reports may be forwarded to all appropriate user through an electronic mail message, or other more conventional avenues of communication. Accordingly, the database in conjunction with the workflow enables all potential customers entered into the database to be managed in an organized manner throughout all stages of a marketing and sales campaign.

LEAD FACTORY
FLOW DIAGRAM



M a r k e t i n g A c t i o n



S a l e s A c t i o n

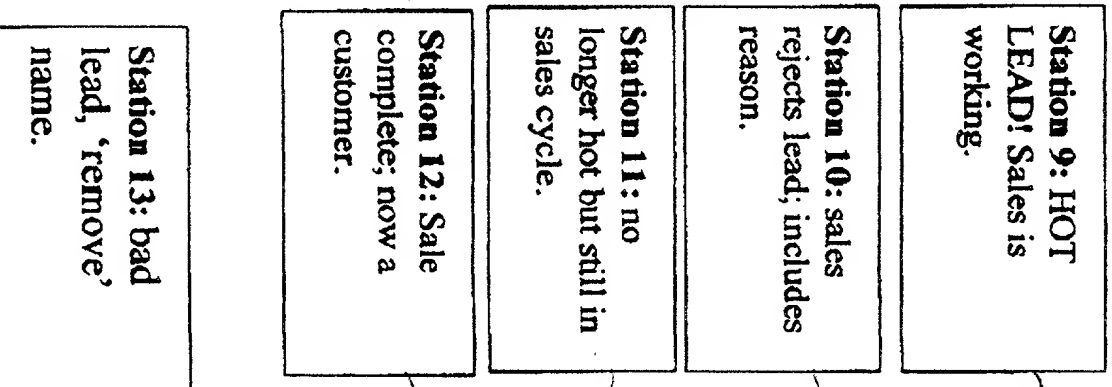


FIG. 1

Administration

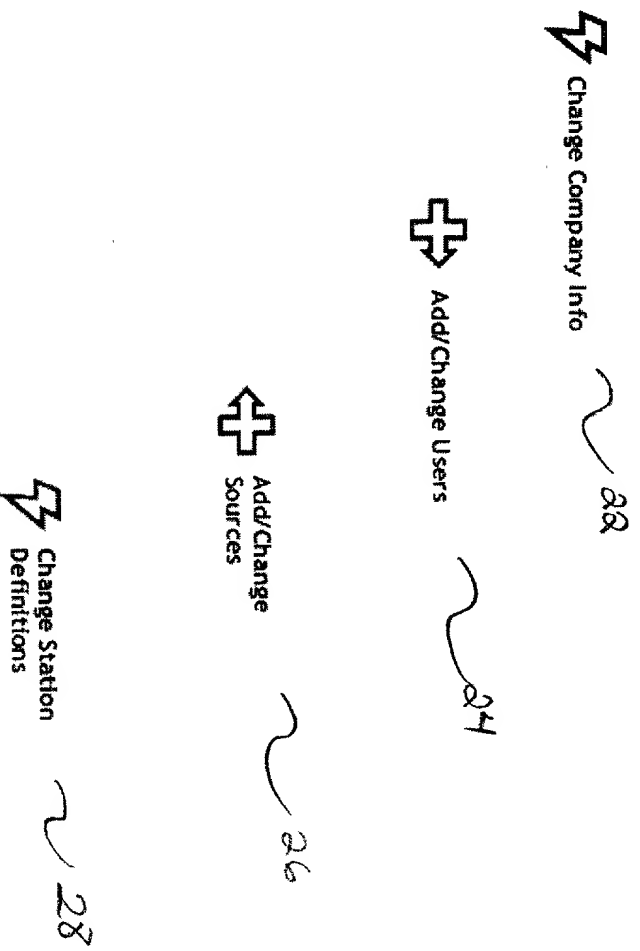


Fig. 2

Tutorial



http://216.59.35.248:8080/examples/htlead/adminhome.jsp

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Admin Users

32 First Name: _____

33 Last Name: _____

Email: _____

User Name: _____

Password: _____

34 Company: _____

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- S1 : Unaware Lead : These are people who probably dont know anything about your company or product(I.e. from mailing lists). Edit
- S2 : Somewhat Aware : These are people who probably dont know anything about your company or product(I.e. from tradeshow). Edit
- S3 : Aware Lead : Inbound inquiry, Suspect have taken an action to get introduced to your company. Edit
- S4 : Unable to contact : Attempts are being made but no contact has resulted. Edit
- S5 : Unqualified : This person has been formally introduced to your company but remains unqualified at this time. Edit
- S6 : Warm Lead : Warm lead, not ready for sale yet. Requires further marketing qualification. Edit
- S7 : Influencer not primary contact : This is not the key contact but someone who may influence a sale. Keep on marketing to this person. Edit
- S8 : Mailing List : General mailing list
- S9 : Hot Lead : Hot Lead! Passed to sales for close. Edit
- S10 : Rejected Lead : Sales rejects lead; includes reason Edit
- S11 : In pipeline : Still in the sales pipeline but not considered hot. Edit
- S12 : Sale Complete : Sale complete! now a customer.
- S13 : Bad Lead : Bad lead

48

Fig. 4

Admin

Station 1 Definition



SI : Unaware Lead:
These are people who probably don't know anything about your company or product (i.e. from mailing lists).

Stationmaster: [admin] Sarah
Stationmaster may reassign to: [Sarah] 52 54 56
The duration a lead may remain in this station is: 1 days.
Once leads expire, send an email to: [admin] 58
Should leads remain in that station 1 week after
the first email is sent, send another email to: [admin] 62
If no response after one more week, move leads to station: 64

Save 66

FIG. 5



Add a Source

New source name ~ 70 ~

~ 68

Description ~ 72 ~

Station ~ 74 ~

Select Station



Save

~ 76

Edit a Source

Source ~ 78 ~

Select Source



Description ~ 80 ~

Station ~ 82 ~

Select Station



Save

~ 84

FIG. 6

add a name



| | | | |
|----------------------------|--|---------------------------|---|
| Company | <input type="text" value="None"/> | Division | <input type="text" value="Select Division"/> |
| Contact First Name* | <input type="text" value="Add New Company"/> | Contact Last Name* | <input type="text" value="Add New Division"/> |
| Title | <input type="text"/> | Other Contacts | <input type="text" value="Select Person"/> |
| Address | <input type="text"/> | Office Phone | <input type="text"/> |
| Street Name | <input type="text"/> | Cell Phone | <input type="text"/> |
| City | <input type="text"/> | Other Phone | <input type="text"/> |
| State/Province | <input type="text"/> | Fax | <input type="text"/> |
| Zip/Postal Code | <input type="text"/> | Email | <input type="text"/> |
| Country | <input type="text"/> | | |
| Comment | <input type="text"/> | | |

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| | | | |
|-------------------------|--|-----------------------|----------------------|
| Source* | <input type="text" value="Select Source"/> | Add New Source | <input type="text"/> |
| Station Primary* | <input type="text"/> | Assigned to | <input type="text"/> |

96

Fig. 7



1. Create a new map

New Map

108

2. Assign

Station:

S1 : Unaware Lead



Source:

Chicago Tribune



3. Select an existing map

102

96



Select an existing Map

104

Next

106

Fig. 8

Import List



1. Select a file to import:

Browse...

Submit File

FIG. 9

To narrow search, check one or more boxes and enter criteria:



☐ Contact first name 122

☐ Contact last name 124

☐ Company name 126

☐ Source 128

☐ Station 130

☐ Date entered 134

☐ Assigned To 136

☐ Get all leads! 140

☐ Search by criteria! 138

FIG. 10

Select a
Report:

By Chicago Tribune
By Boston Herald
Source: USA Today

Run Report

325

By S1 : Unaware Lead
By S2 : Somewhat Aware
Station: S3 : Aware Lead

Run Report

325

Aging Chicago Tribune
By Boston Herald
Source: USA Today

Run Report

325

Aging S1 : Unaware Lead
by S2 : Somewhat Aware
Station: S3 : Aware Lead

Run Report

325

Aging
by
Lead:

Run Report

320

Fig. 11



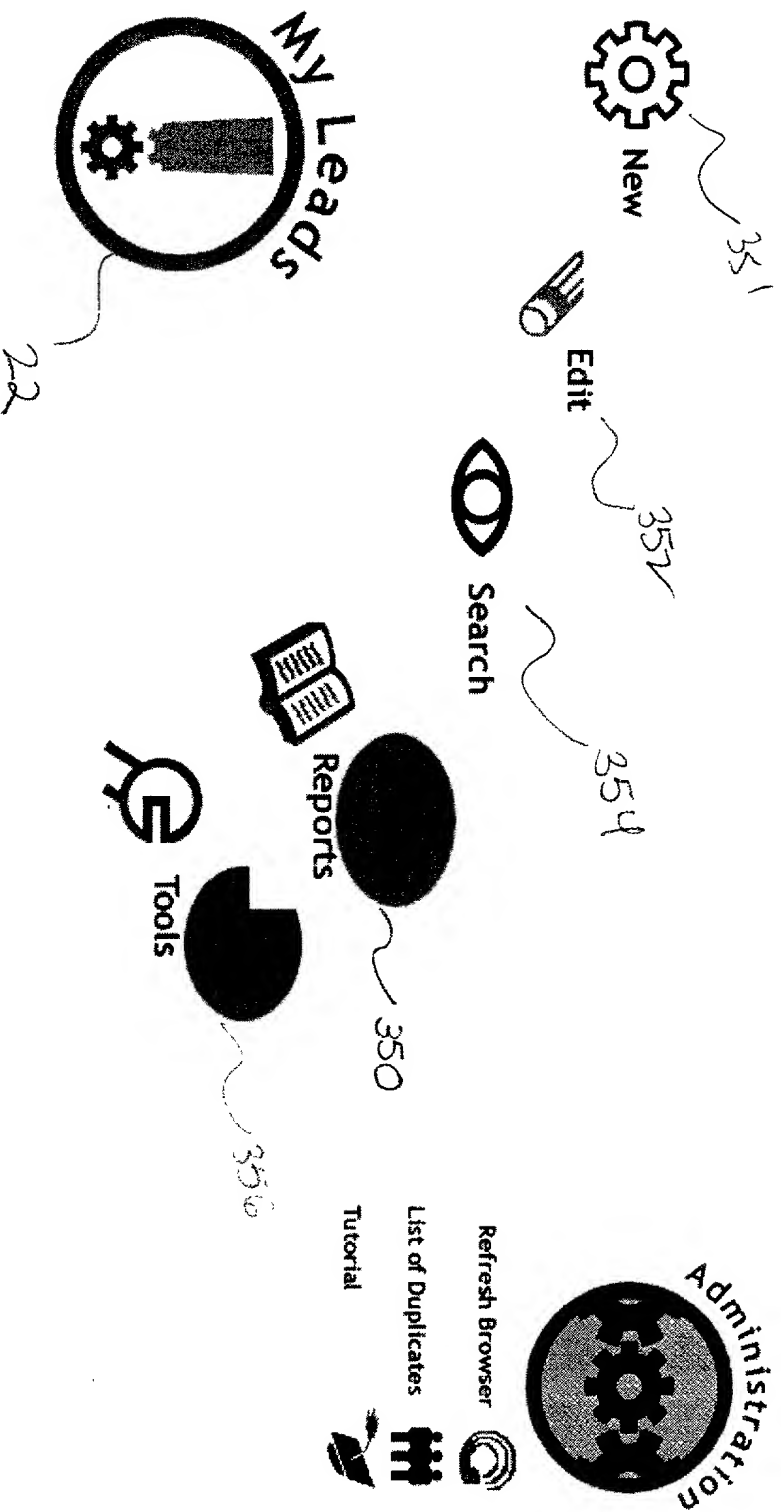


Fig 12

AutoGen Reporting



Review existing autogen 360

Select Report

Previous Users Select to Delete 364

Select User To Delete

Create New Report 376

DateRange: Select One 368

☐ Last 24 hours

☐ 1 Week prior

☐ 1 Month Prior

☐ 3 Months prior

☐ 6 Months prior

☐ 1 Year prior

☐ Since system inception

Frequency of update: 372

☐ Once a day

☐ Once a week

☐ Once a month

☐ Once a quarter

Fig. 13

70

[illegible]

Act On A Lead

| | | | |
|---------------------|---------------------|--------------------|-----------------|
| Company | Coke | Division | Select Division |
| 408 Edit Company | 402 | Edit Division | 412 |
| Contact First Name* | Adam0 | Contact Last Name* | Greisman0 |
| Title 414 | CTO | Other Contacts | Adam0 Greisman0 |
| Address | | Office Phone | 0 |
| Street Name | 2310 | Cell Phone | 0 |
| City | NYC0 | Other Phone | 0 |
| State/Province | NY0 | Fax | 0 |
| Zip/Postal Code | 018030 | Country | USA |
| Email | info@coke.com | | |
| Comment | 418 | | |
| Source* | USA Today | | |
| Station Primary* | S2 : Somewhat Aware | Assigned to | admin |
| 422 | Clear | Submit | Print |

FIG. 15

view/edit a name



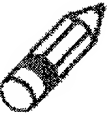
| | | | |
|----------------------------|-----------------------------------|---------------------------|--|
| Company | <input type="text" value="None"/> | Division | <input type="text" value="Select Division"/> |
| Contact First Name* | <input type="text" value="430"/> | Edit Division | <input type="text" value="432"/> |
| Title | <input type="text"/> | Contact Last Name* | <input type="text"/> |
| Address | <input type="text"/> | Other Contacts | <input type="text" value="Select Person"/> |
| Street Name | <input type="text"/> | Office Phone | <input type="text"/> |
| City | <input type="text"/> | Cell Phone | <input type="text"/> |
| State/Province | <input type="text"/> | Other Phone | <input type="text"/> |
| Zip/Postal Code | <input type="text"/> | Fax | <input type="text"/> |
| Country | <input type="text"/> | Email | <input type="text"/> |
| Comment | <input type="text" value="432"/> | | |
| Source* | <input type="text" value="440"/> | | |
| Station Primary* | <input type="text"/> | | |
| Assigned to | <input type="text"/> | | |

445

450

FIG. 16

view/edit a company



| | | |
|-----------------|---------------------|-----|
| Company name* | Coke | 460 |
| Street address | Nevada St | 462 |
| City | Nevada | 464 |
| State/Province | New Jersey | 466 |
| ZIP/Postal code | 18972 | 468 |
| Country | USA | |
| Email | tarun@coke.com | |
| Url | www.coke.com | |
| Phone | 898 | |
| Comments | Coke is Coke.....!! | |

Save

Print

Back

480

482

484

Fig. 17

| DECLARATION FOR UTILITY OR DESIGN PATENT APPLICATION (37 CFR 1.63) | | Attorney Docket Number | 1113-201 | | | | | | | | | | | | | | | |
|--|--------------------------|---|--|--|---------|----------------------------------|----------------------|------------------------------------|--|--|--|--|--|-----------------------|--------------------------|---|--|--|
| | | First Named Inventor | Over | | | | | | | | | | | | | | | |
| | | COMPLETE IF KNOWN | | | | | | | | | | | | | | | | |
| | | Application Number | | | | | | | | | | | | | | | | |
| | | Filing Date | | | | | | | | | | | | | | | | |
| | | Group Art Unit | | | | | | | | | | | | | | | | |
| | | Examiner Name | | | | | | | | | | | | | | | | |
| <input type="radio"/> Declaration Submitted with Initial Filing | OR | <input type="radio"/> Declaration Submitted after Initial filing (surcharge (37 CFR 1.16(e))) | | | | | | | | | | | | | | | | |
| As a below named inventor, I hereby declare that: My residence, post office address, and citizenship are as stated below next to my name I believe I am the original, first and sole inventor (if only one name is listed below) or an original, first and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled: <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">Lead Suspect Management</div> <div style="text-align: center; margin-top: 5px;">(Title of the invention)</div> the specification of which <input type="radio"/> is attached hereto OR <input type="radio"/> was filed on (MM/DD/YYYY) <div style="border: 1px solid black; display: inline-block; width: 150px; height: 1.2em; vertical-align: middle;"></div> as United States Application Number or PCT International Application Number <div style="border: 1px solid black; display: inline-block; width: 150px; height: 1.2em; vertical-align: middle;"></div> and was amended on (MM/DD/YYYY) <div style="border: 1px solid black; display: inline-block; width: 150px; height: 1.2em; vertical-align: middle;"></div> (if applicable). I hereby state that I have reviewed and understand the contents of the above identified specification, including the claims, as amended by any amendment specifically referred to above I acknowledge the duty to disclose information which is material to patentability as defined in 37 CFR 1.56. I hereby claim foreign priority benefits under 35 U.S.C. 119(a)-(d) or 365(b) of any foreign application(s) for patent or inventor's certificate, or 365(a) of any PCT international application which designated at least one country other than the United States of America, listed below and have also identified below, by checking the box, any foreign application for patent or inventor's certificate, or of any PCT international application having a filing date before that of the application on which priority is claimed <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>Prior Foreign Application Number(s)</th><th>Country</th><th>Foreign Filing Date (MM/DD/YYYY)</th><th>Priority Not Claimed</th><th>Certified Copy Attached? YES NO</th></tr></thead><tbody><tr><td></td><td></td><td></td><td style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></td><td style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></td></tr></tbody></table> <input type="radio"/> Additional foreign application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto: I hereby claim the benefit under 35 U.S.C. 119(e) of any United States provisional application(s) listed below <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>Application Number(s)</th><th>Filing Date (MM/DD/YYYY)</th><th rowspan="2"><input type="radio"/> Additional provisional application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto.</th></tr></thead><tbody><tr><td></td><td></td></tr></tbody></table> | | | | Prior Foreign Application Number(s) | Country | Foreign Filing Date (MM/DD/YYYY) | Priority Not Claimed | Certified Copy Attached? YES NO | | | | <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> | <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> | Application Number(s) | Filing Date (MM/DD/YYYY) | <input type="radio"/> Additional provisional application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto. | | |
| Prior Foreign Application Number(s) | Country | Foreign Filing Date (MM/DD/YYYY) | Priority Not Claimed | Certified Copy Attached? YES NO | | | | | | | | | | | | | | |
| | | | <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> | <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> | | | | | | | | | | | | | | |
| Application Number(s) | Filing Date (MM/DD/YYYY) | <input type="radio"/> Additional provisional application numbers are listed on a supplemental priority data sheet PTO/SB/02B attached hereto. | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |

(Page 1 of 2)

DECLARATION — Utility or Design Patent Application

I hereby claim the benefit under 35 U.S.C. 120 of any United States application(s), or 365(c) of any PCT international application designating the United States of America, listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in the prior United States or PCT international application in the manner provided by the first paragraph of 35 U.S.C. 112, I acknowledge the duty to disclose information which is material to patentability as defined in 37 CFR 1.56 which became available between the filing date of the prior application and the national or PCT international filing date of this application.

| U.S. Parent Application or PCT Parent Number | Parent Filing Date (MM/DD/YYYY) | Parent Patent Number (# applicable) |
|--|---------------------------------|-------------------------------------|
| | | |

• Additional U.S. or PCT international application numbers are listed on a supplemental priority data sheet PTO/SB/02C attached hereto.

As a named inventor, I hereby appoint the following registered practitioner(s) to prosecute this application and to transact all business in the Patent and Trademark Office connected therewith:

- Customer Number OR
- Registered practitioner(s) name/registration number listed below

Place Customer Number Bar Code Label Here

| Name | Registration Number | Name | Registration Number |
|--------------------------|---------------------|------|---------------------|
| Rochelle Lieberman, Esq. | 39,276 | | |

• Additional registered practitioner(s) named on supplemental Registered Practitioner Information sheet PTO/SB/02C attached hereto.

Direct all correspondence to: • Customer Number OR • Correspondence address below

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| Country | United States of America | Telephone | 301-948-7775 | Fax | 301-948-7774 |

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under 18 U.S.C. 1001 and that such willful false statements may jeopardize the validity of the application or any patent issued thereon.

| | | | | | |
|--|----------------|--|-----|-------------|-------|
| Name of Sole or First Inventor: | | • A petition has been filed for this unsigned inventor | | | |
| Given Name (first and middle (if any)) | | Family Name or Surname | | | |
| Myra | | Dyer | | | |
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| City | Ashland | State | MA | Zip | 01721 |
| | | Country | USA | | |

• Additional inventors are being named on the Supplemental Additional Inventor(s) sheet(s) PTO/SB/02A Attached hereto.

(Page 2 of 2)